Business Intelligence Reporting

Demo 2: Modifying a Basic Ad Hoc Query

Washington State HRMS Business Intelligence (BI)

BI Power User Workshop Materials

General Topics – BI Power Users

Demo 2: Modifying a Basic Ad Hoc Query

The following demonstration will show how to modify an existing ad hoc query and add features to the basic query created in Demo 1: Creating a Basic Ad Hoc Query.

This demonstration will create an ad hoc query that includes:

- ➢ Number of Employees by Personnel Area and Ethnic Origin
- ➢ Number of Female Employees by Personnel Area and Ethnic Origin
- ➢ Average Salary of Female Employees by Personnel Area and Ethnic Origin
- ➢ Employees by Personnel Area and Ethnic Origin (Free Characteristic)
- ➢ Filter by Employment Status (Active) and Personnel Number (1110)

Concepts covered in this demonstration include:

- I. Saving a Query as a New Query
- II. Adding a Restricted Key Figure
- III. Adding a Formula
- IV. Running the Ad Hoc Query
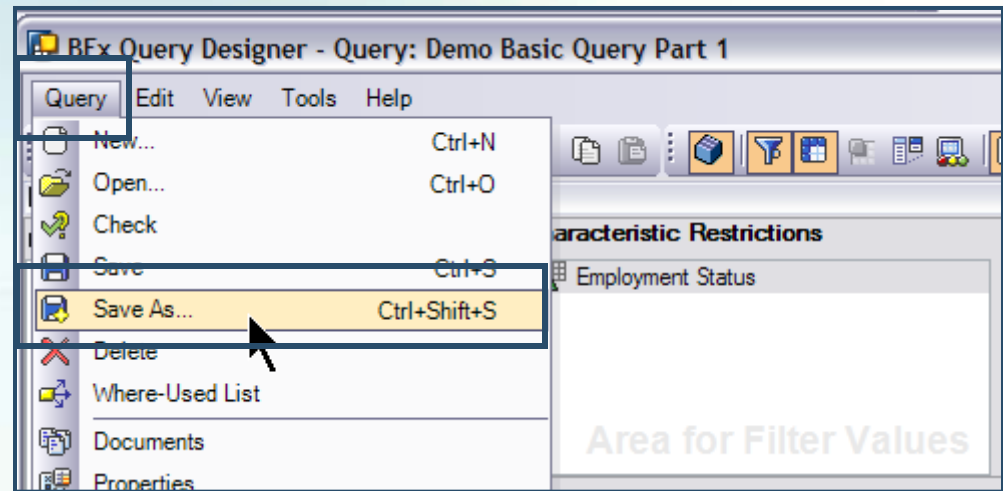- V. Ad Hoc Query Results
- VI. Bookmark the Ad Hoc Query Results

Demo Basic Query Part 2

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	Number of Employees ⇕	Number of Female Employees ⇕	Avg Salary - Female Employee ⇕
▾ Columns			
• Key Figures			
Personnel Area ⇕			$
▾ Rows			
• Personnel Area	Dept of Personnel	152	110	56,000.04
▾ Free characteristics	Information Services Division	78	43	70,454.95
• Challenge Indicator	Overall Result	230	153	60,062.53
• Ethnic Origin			

Demo 2: Modified Ad Hoc Query Results
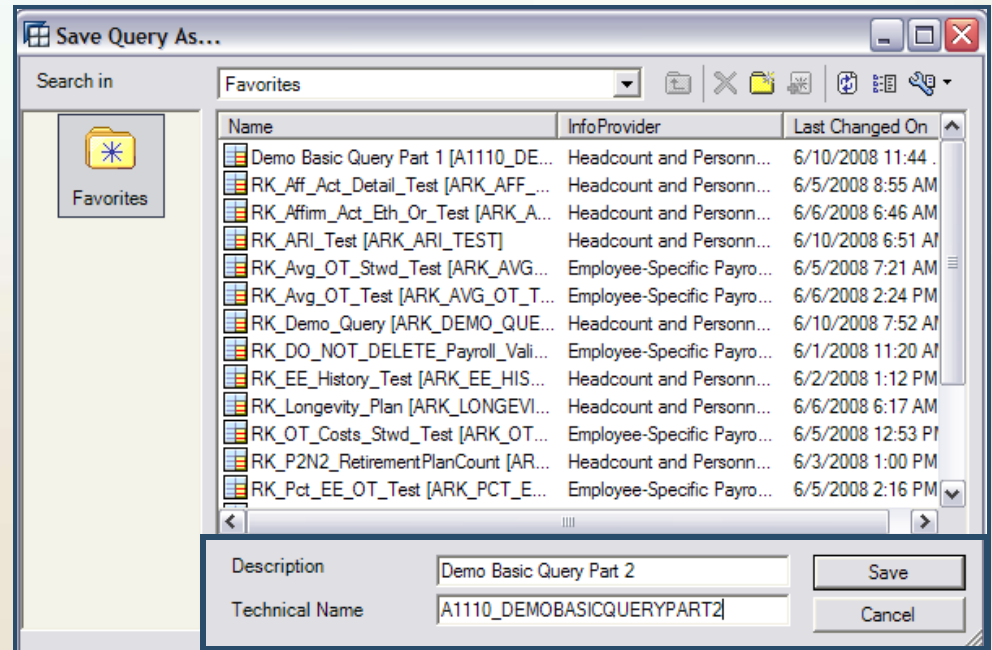
Demo 2: Modifying a Basic Ad Hoc Query

I. Saving a Query as a New Query

1. Open the Demo Basic Query Part 1 in BEx Query Designer.

2. Click the Save Query As… from the Query option on theBEx Query Designer toolbar.

Result: The "Save Query As…" screen will be displayed.

3. Enter "Demo Basic Query Part 2 in the Description text box of the "Save Query As…" screen.

4. Enter "A1110_DEMOBASICQUERYPART2" in the Technical Name.

5. Click Save.

Demo 2: Modifying a Basic Ad Hoc Query

I. Saving a Query as a New Query, Cont…

Result: A new Ad hoc query will be saved as "Demo Basic Query Part 2" and return the user to BEx Query Designer with the new ad hoc query displayed for modifications.
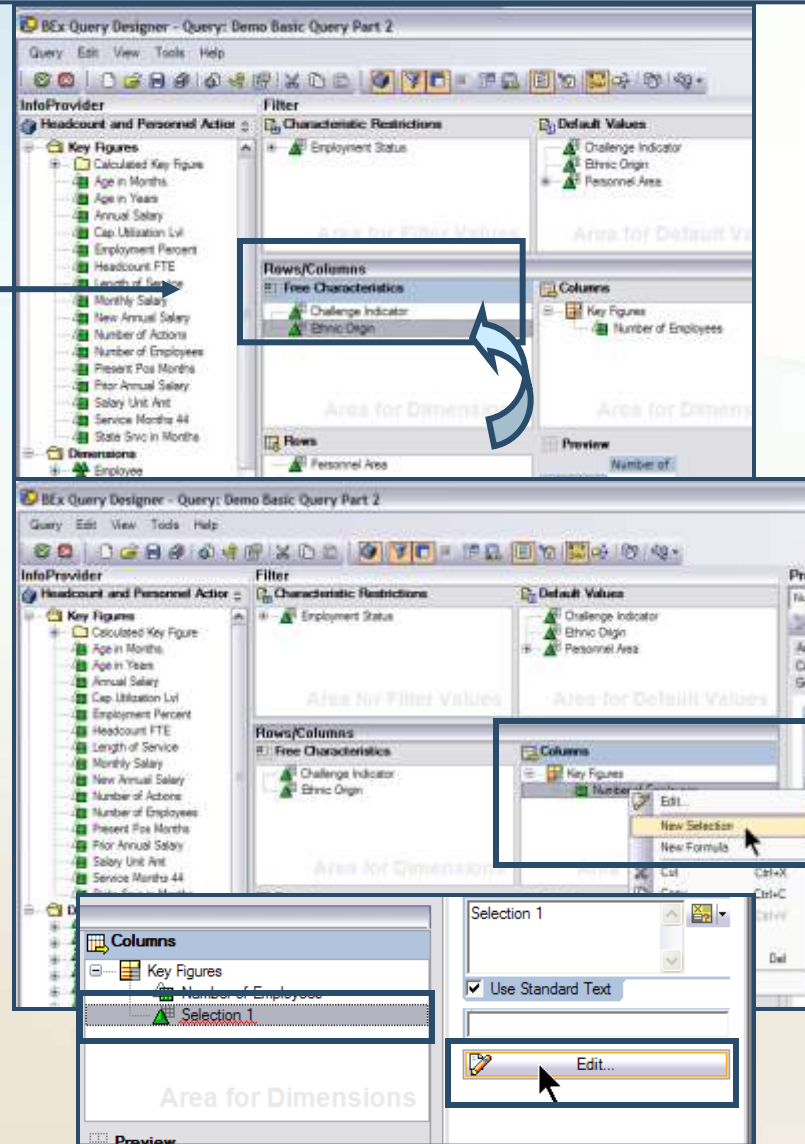
Demo 2: Modifying a Basic Ad Hoc Query

II. Adding a Restricted Key Figure

1. Drag&Drop the Ethnic Origin Attribute from the Rows section of the query to the Free Characteristics section.

2. Right mouse-click the Key Figure in the Columns section of the query to open the Context Menu.

3. Select New Selection.

4. Highlight the new selection and click Edit in the Properties pane.

Result: The "Change Selection" screen will be displayed.

II. Adding a Restricted Key Figure, Cont...

4. Rename the Key Figure to "Number of Female Employees" in the Description text box.

5. Drag&Drop the Number of Employees Key Figure to the "Details of the Selection"(it may be necessary to expand the Key Figures column).

6. Drag&Drop the Gender Characteristic from the Personal Data Dimension to the "Details of the Selection".

7. Right mouse-click the Gender Characteristic in the "Details of the Selection" to open the Context Menu.

8. Select Restrict.
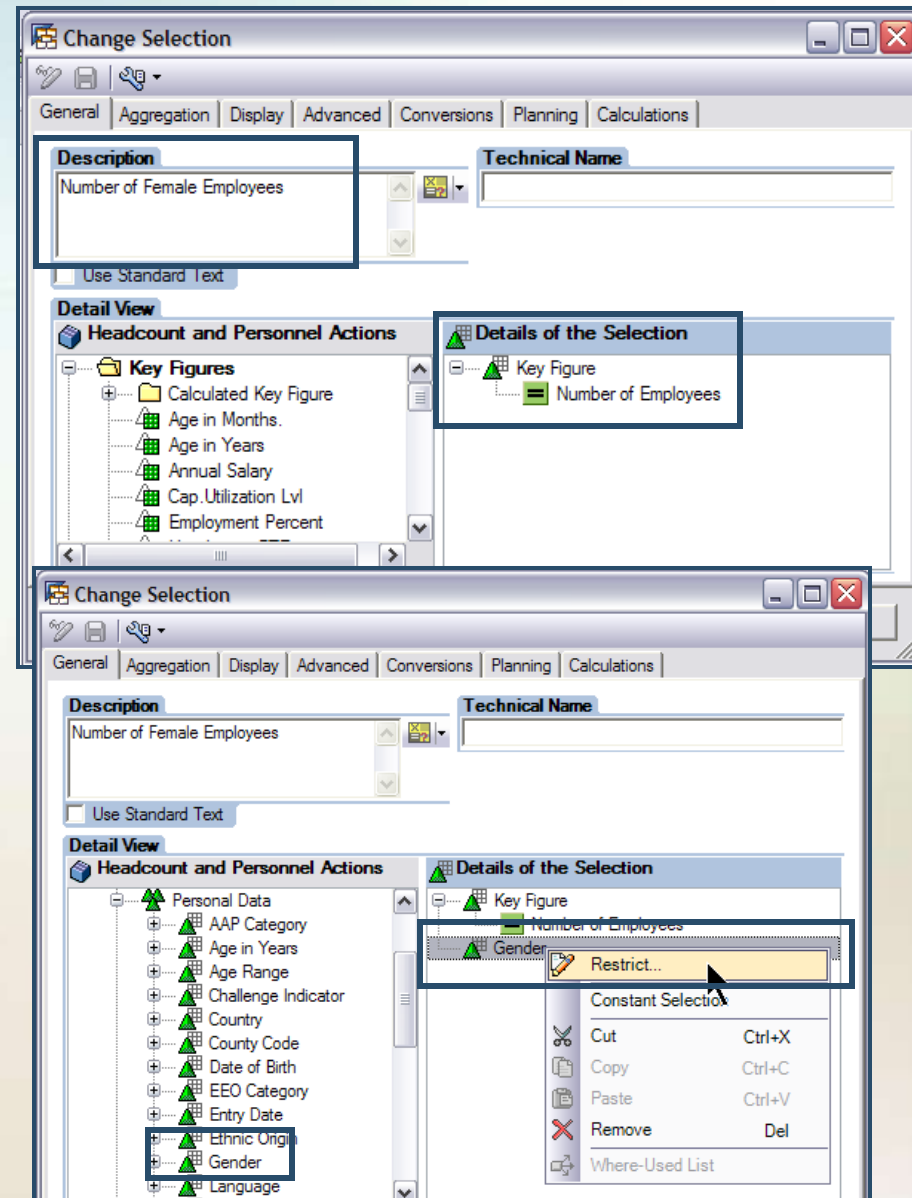
Demo 2: Modifying a Basic Ad Hoc Query

II. Adding a Restricted Key Figure, Cont...

9.   Drag&Drop Female from the description column to the Chosen Selection column.

10.   Click OK.
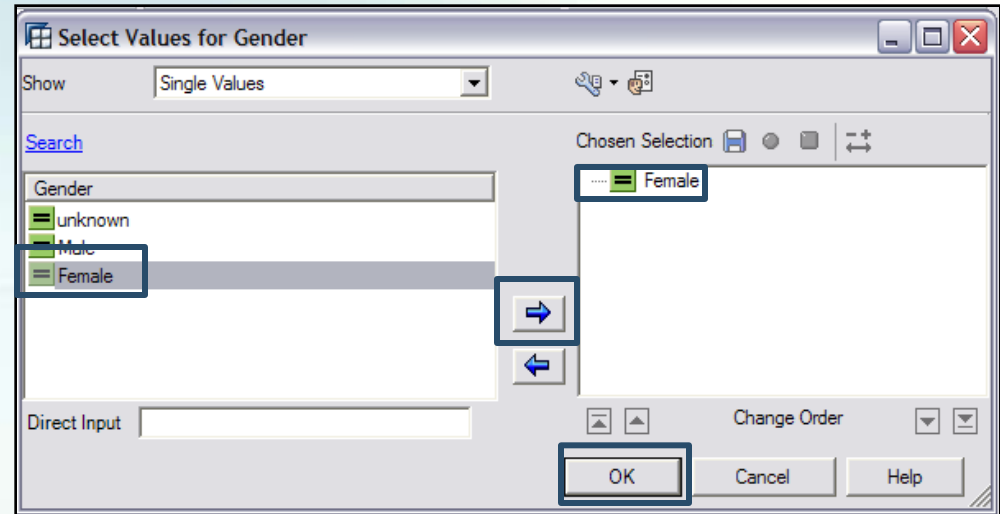
Result: The Gender Characteristic restriction has been added to the Number of Female Employees Restricted Key Figure.

11.   Click OK to close the Change Selection screen.
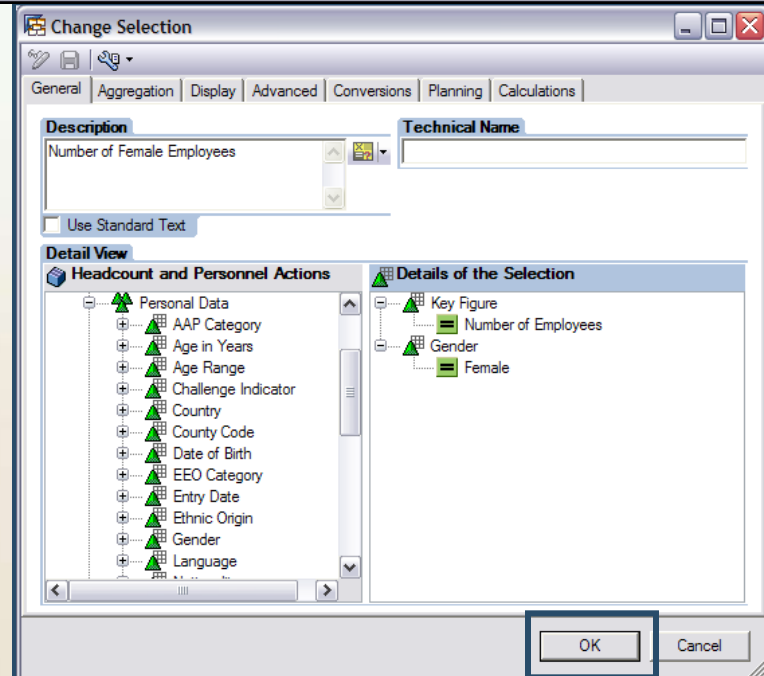
Demo 2: Modifying a Basic Ad Hoc Query

II. Adding a Restricted Key Figure, Cont...

Result: The Number of Female Employees Restricted Key Figure has been added in the Columns section of the query. This Key Figures will display the number of females employees in the query results.
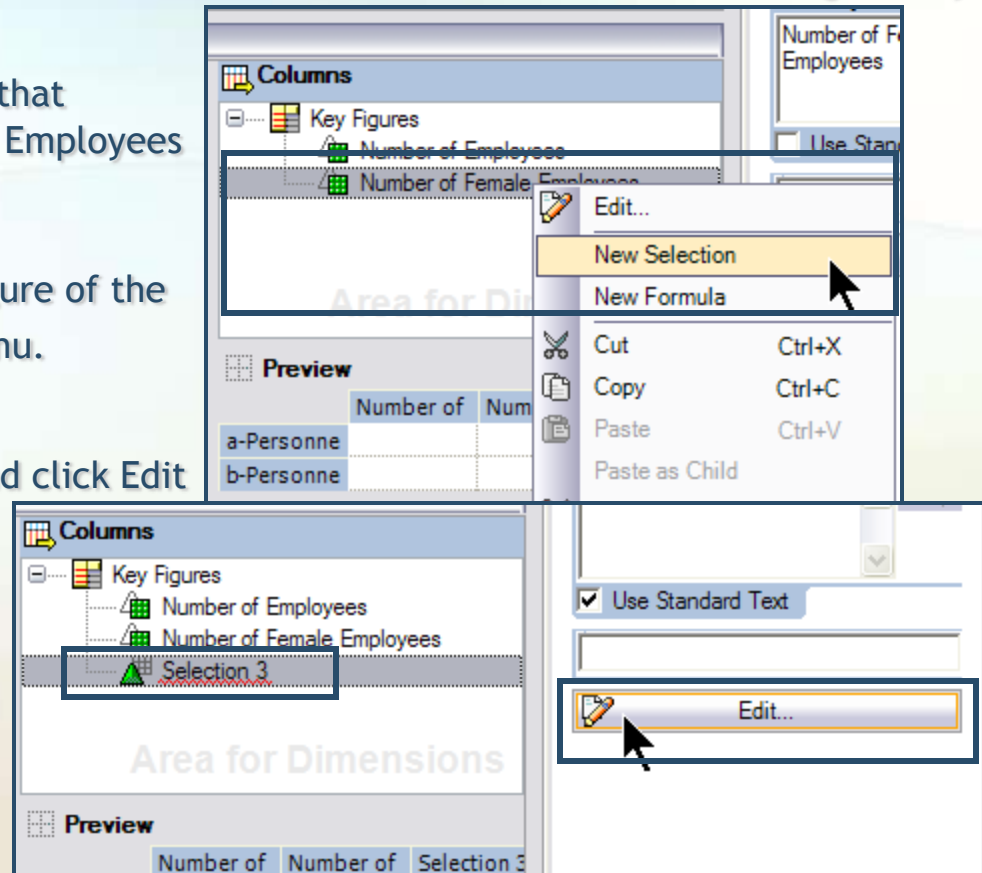
Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula

The demonstration below shows how to create a formula that will calculate the average salary for female employees.

First, create a Restricted Key Figure that includes the Annual salary of Female Employees only:

1. Right mouse-click on a Key Figure of the query to open the Context Menu.

2. Select New Selection.

3. Highlight the new selection and click Edit in the Properties pane.

Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula, Cont…

Result: The Change Selection screen will be displayed.

3.   Rename the Key Figure to "Female Employees Annual Salary" in the Description text box.

4.   Drag&Drop the Annual Salary Key Figure to the Details of the Selection area.

5.   Drag&Drop the Gender Characteristic to the Details of the Selection area.

6.   Right mouse-click the Gender Characteristic in the Details of the Selection area to open the Context Menu.
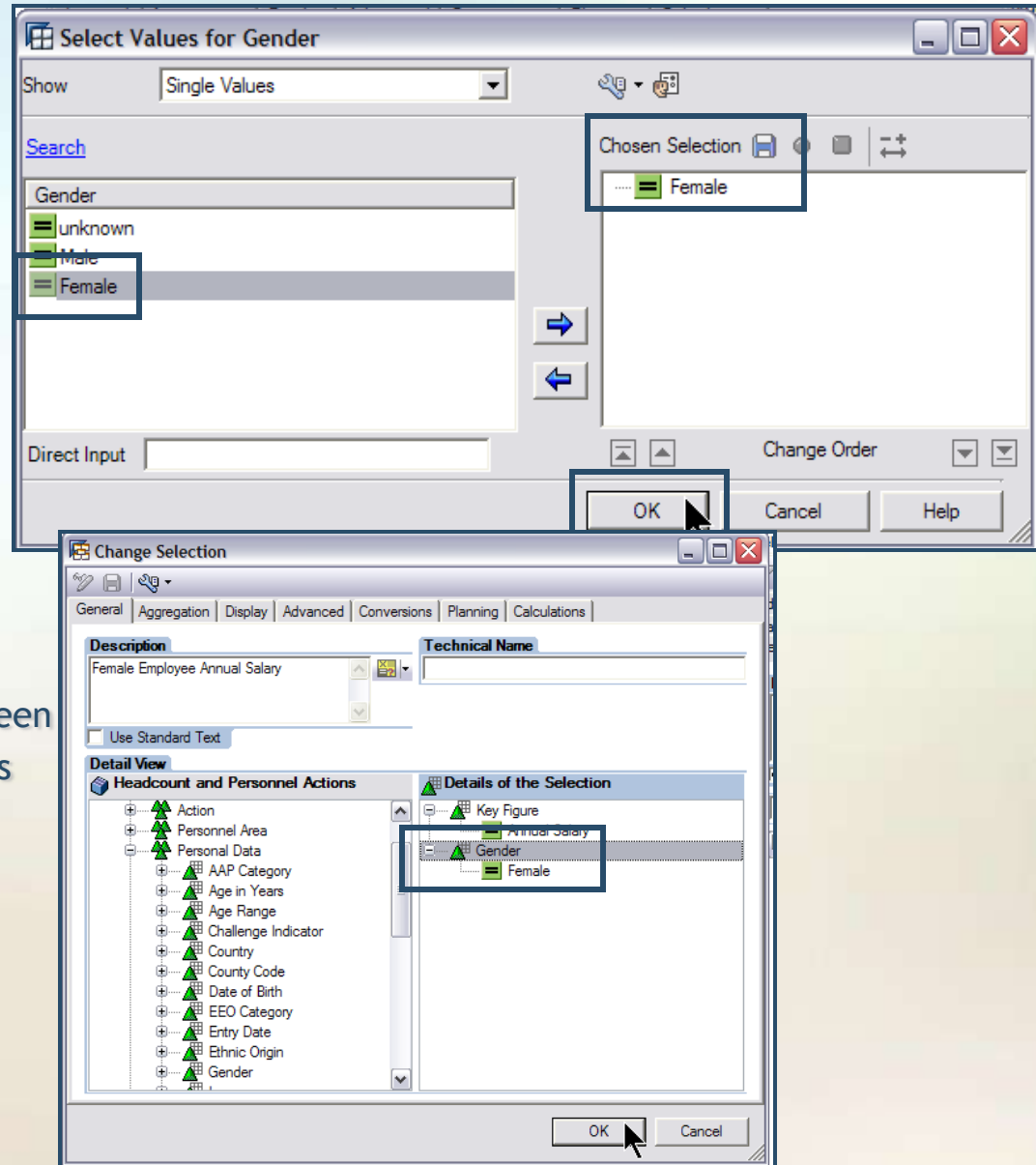
7.   Select Restrict.
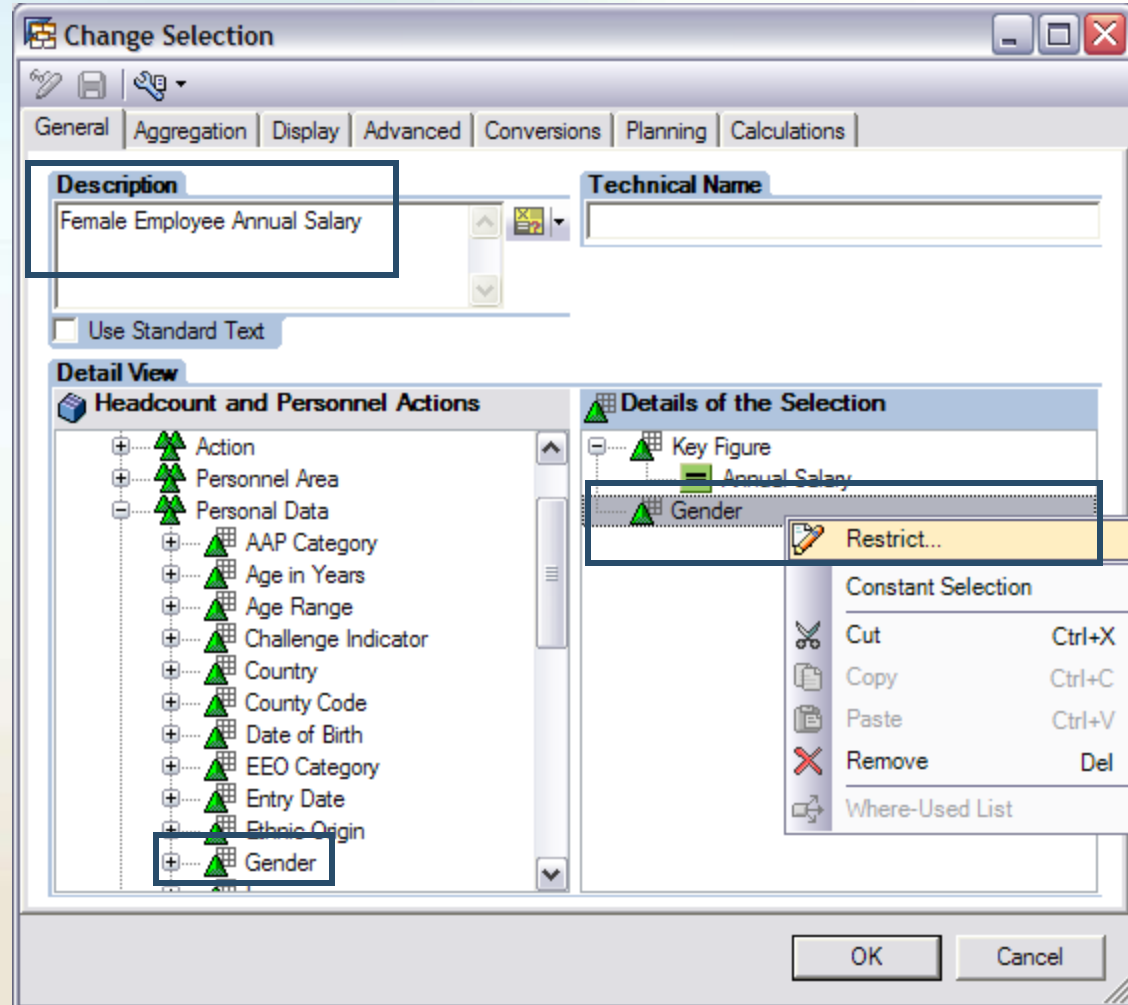
Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula, Cont...

8. Drag&Drop Female from the Description column to the Details of the Selection area.

9. Click OK.

Result: The Gender Characteristic restriction has been added to the Female Employees Annual Salary Restricted Key Figure.

10. Click OK to close Change Selection screen.

Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula, Cont…

Result: The Female Employees Annual Salary Restricted Key Figure has been created in the Columns section of the query.

This Key Figure will be hidden from the query results in the next steps. It will be used to calculate the Average Salary of Female Employees only.

Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula, Cont...

To hide the Female Employees Annual Salary Restricted Key Figure:

11. Select the Female Employees Annual Salary Restricted Key Figure to access it in the Properties pane..

12. Select the option "Always Hide".
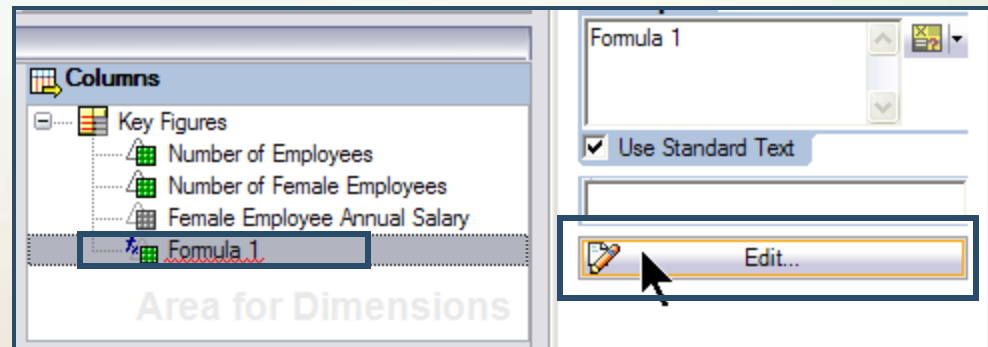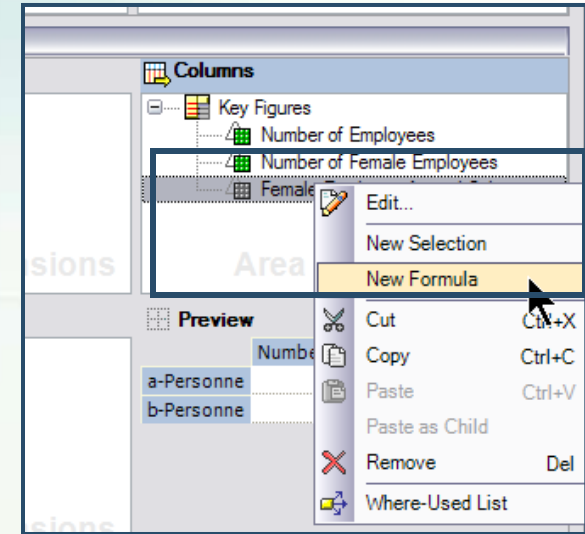

Key Figures that are hidden, change color.

Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula, Cont…

Next, create the Formula that will calculate the Average salary of Female Employees:

15.   Right mouse-click Key Figures to open the Context Menu.

16.   Select New Formula.

17.   Select the new formula added to the columns and click Edit.

Result: The Change Formula screen will be displayed.

III. Adding a Formula, Cont…

18. Position the cursor in the Formula field.

19. Double-click the Female Employees Annual Salary in the Structure Elements of the Operands list.

    The Key Figure will be added to the Formula field.

20. Click the Divided by symbol (/).

    The Divided by symbol will be added to the Formula field.

21. Double-click the Number of Female Employees Key Figure in the Structure Elements of the Operands list.

    The Key Figure will be added to the Formula field.

22. Click OK.
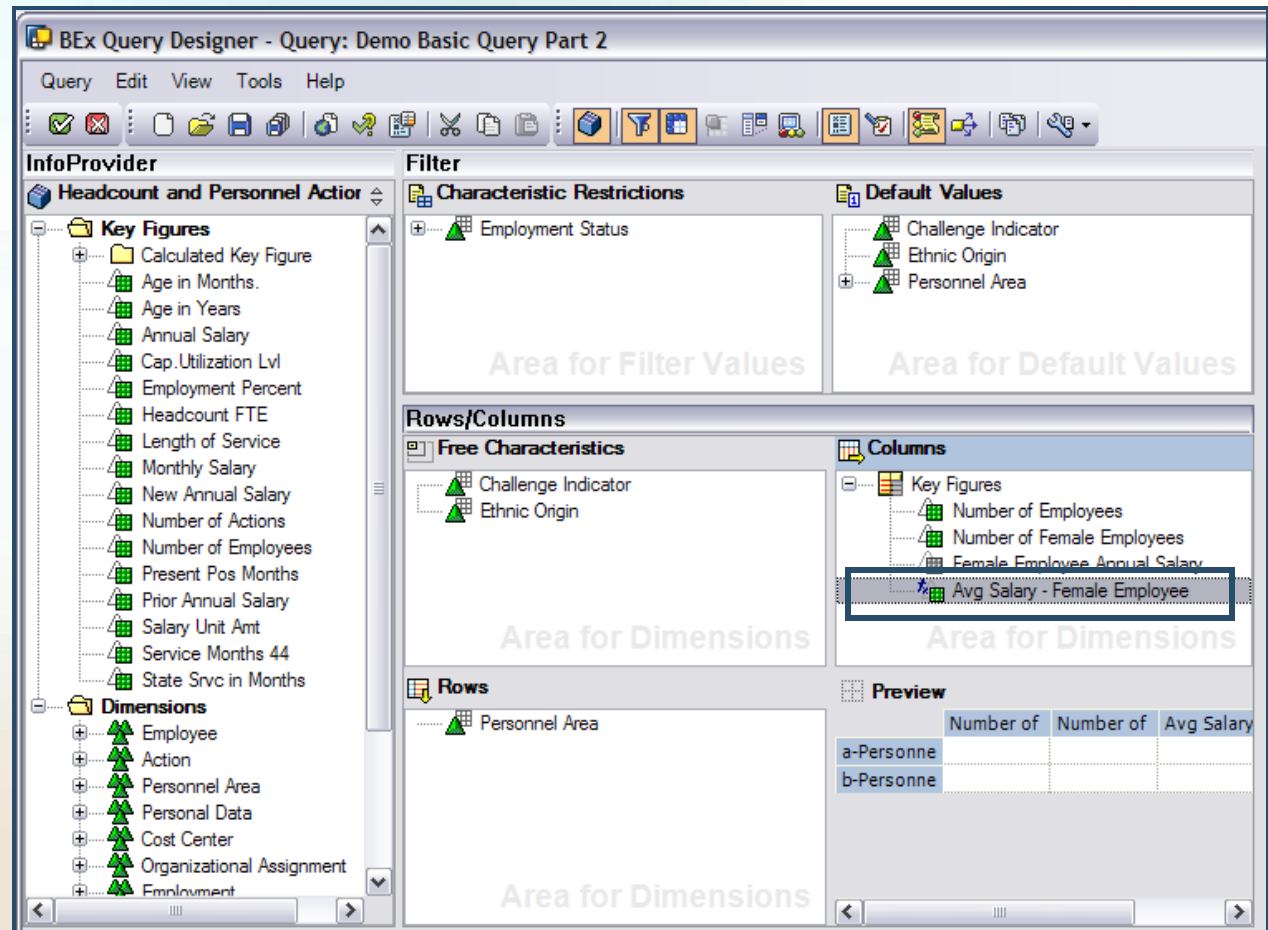
Demo 2: Modifying a Basic Ad Hoc Query

III. Adding a Formula, Cont...

Result: The New Avg Salary – Female Employees Formula has been added to the columns section of the query.
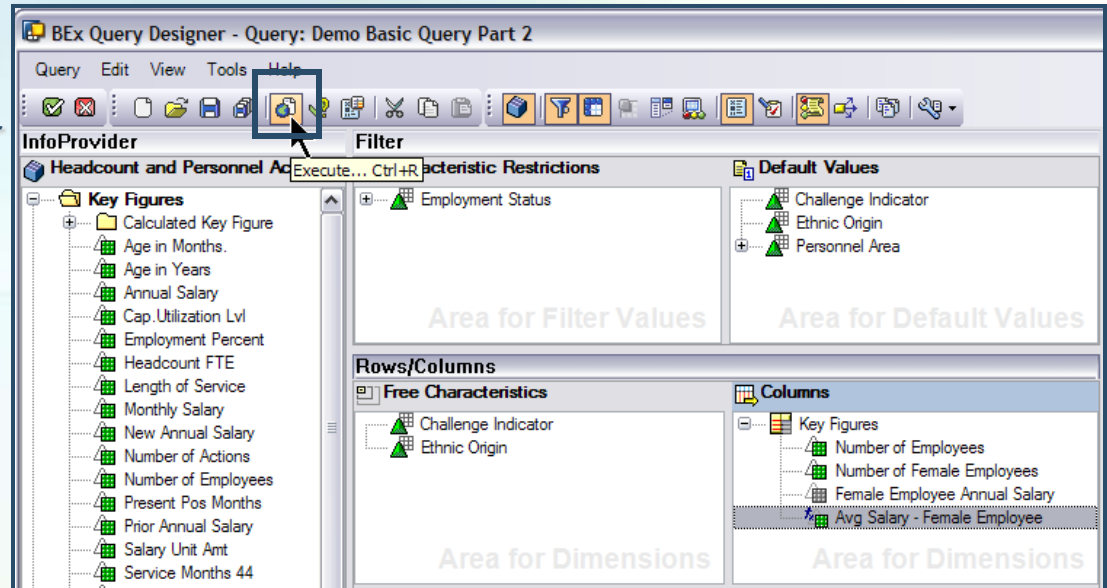
This new Key Figure will calculate the Average Salary of Female Employees in the ad hoc query results.
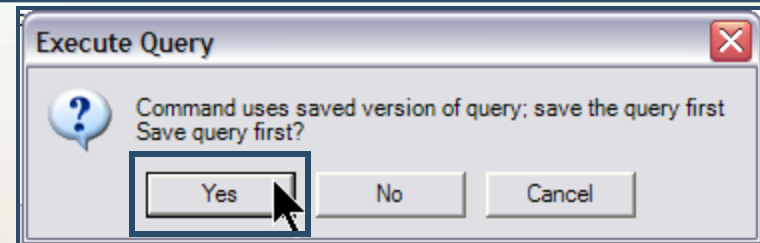
Demo 2: Modifying a Basic Ad Hoc Query

IV. Running the Ad Hoc Query

1. Click the Execute Query on the Web icon 🔵 from the BEx Query Designer toolbar.

If prompted to Save the query, click Yes.

You may be prompted for a userid and password, click cancel ~ the Portal log on screen will be displayed and this is where you will enter your userid and password.

Demo 2: Modifying a Basic Ad Hoc Query

IV. Running the Ad Hoc Query, Cont...

Results: The Variables Entry screen will be displayed (if the user is running an ad hoc query without variables, this screen will not be displayed)

2.   Enter report Variables.

3.   Click OK.

Demo 2: Modifying a Basic Ad Hoc Query

V. Ad Hoc Query Results

Demo Basic Query Part 2

Display As [Table ▼] [Information] [Send] [Print Version] [Export to Excel] [Comments]

▼ Columns	Personnel Area ⇕	Number of Employees ⇕	Number of Female Employees ⇕	Avg Salary - Female Employee ⇕
• Key Figures				$
▼ Rows	Dept of Personnel	152	110	56,000.04
• Personnel Area	Information Services Division	78	43	70,454.95
▼ Free characteristics	Overall Result	230	153	60,062.53
• Challenge Indicator				
• Ethnic Origin				

Demo Basic Query Part 2

Display As [Table ▼] [Information] [Send] [Print Version] [Export to Excel] [Comments]

▼ Columns	Personnel Area ⇕	Ethnic Origin ⇕	Number of Employees ⇕	Number of Female Employees ⇕	Avg Salary - Female Employee ⇕
• Key Figures					$
▼ Rows	Dept of Personnel	10/Not assigned	9	9	60,396.00
• Personnel Area		American Indian/Alaskan	4	2	62,250.00
• Ethnic Origin		Asian or Pacific Islander	9	7	48,776.57
▼ Free characteristics		Black/Not Hispanic origin	10	4	49,377.00
• Challenge Indicator		Hispanic	3	1	141,549.00
		White/Not Hispanic origin	117	87	55,303.99
		Result	152	110	56,000.04
	Information Services Division	10/Not assigned	1	2	69,840.00
		Asian or Pacific Islander	9	5	61,010.40
		Black/Not Hispanic origin	5	2	59,106.00
		Hispanic	2	1	60,420.00
		White/Not Hispanic origin	61	35	72,739.40
		Result	78	43	70,454.95
	Overall Result		230	153	60,062.53

Demo 2: Modifying a Basic Ad Hoc Query

VI. Bookmark the ad hoc Query Results

1. Click an item in the query results
   to open the Context Menu.

2. Select Bookmark.

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3. Add Favorite popup is displayed. Click OK to add the report to your Internet Explorer Favorites.

Demo 2: Modifying a Basic Ad Hoc Query

VI. Bookmark the ad hoc Query Results, Cont...

4. The query has been added to your Favorites.

Result: The Bookmarked query can be run from the Favorites menu in the user's web browser.
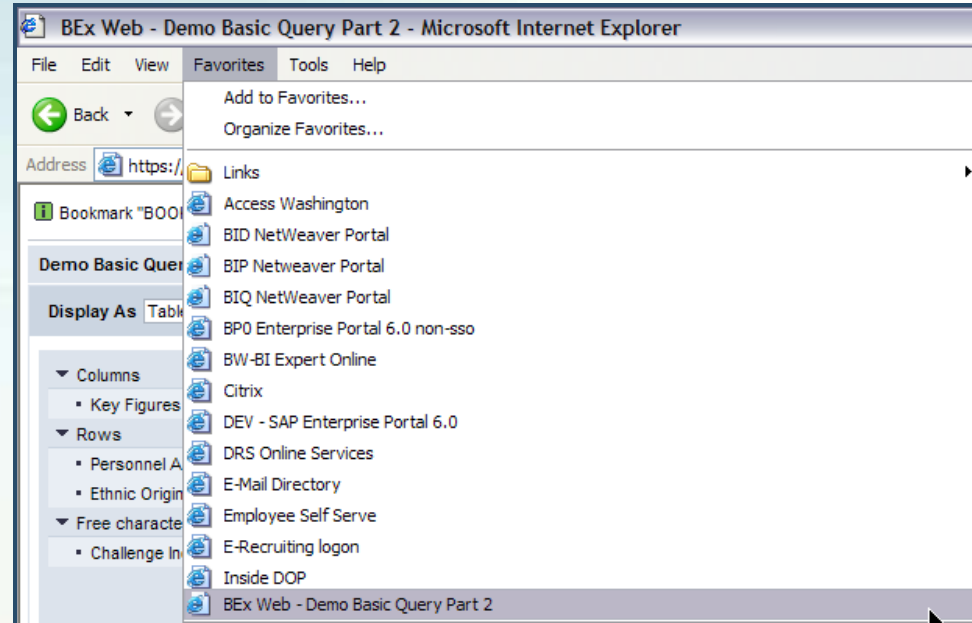
ⓘ To delete the Bookmarked query, right mouse-click the Bookmark in the Favorites folder to open the context menu and click Delete.